LOYOLA UNIVERSITY CHICAGO

Preparing people to lead extraordinary lives

WebFOCUS Reporting User Manual



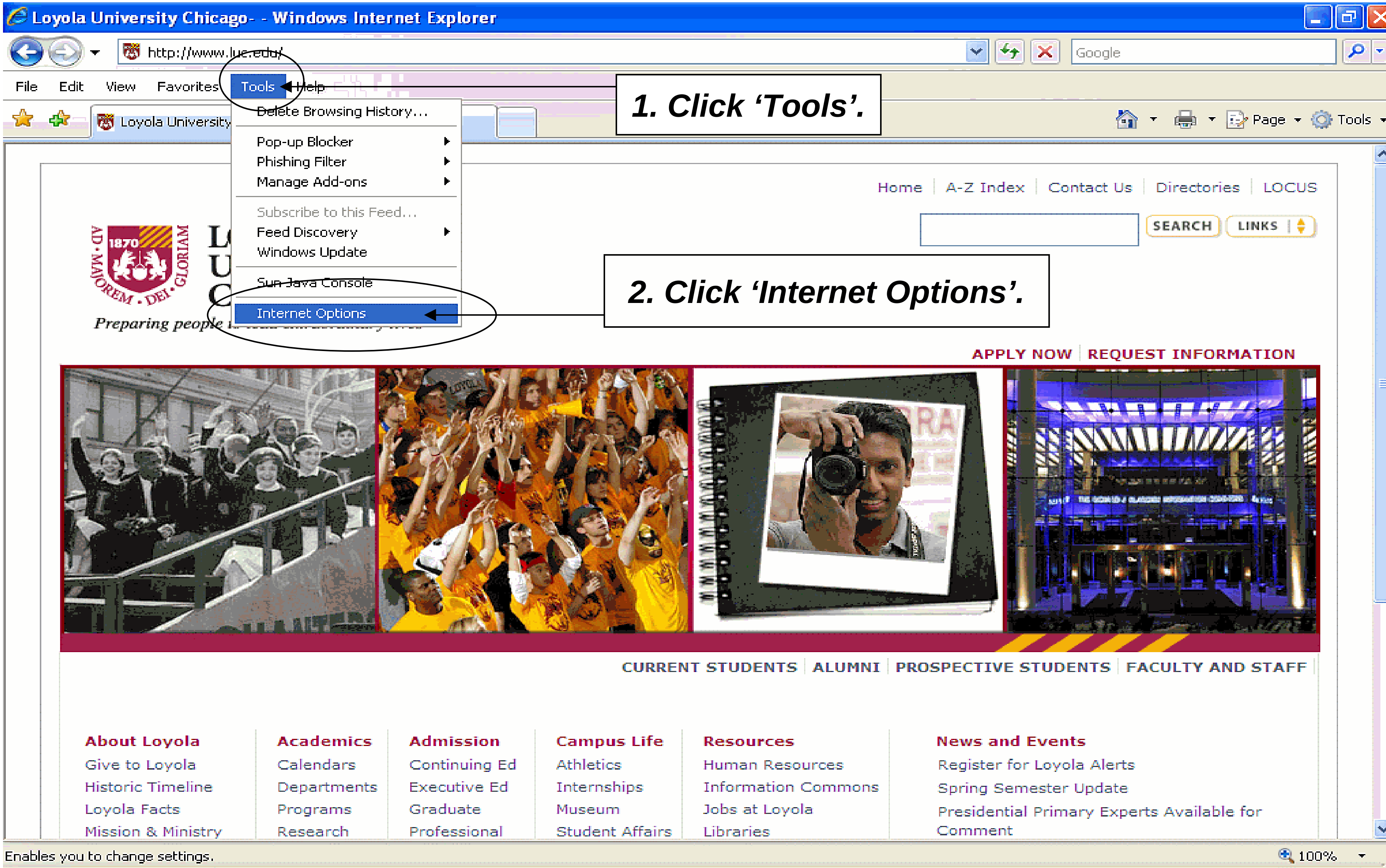
Table of Contents

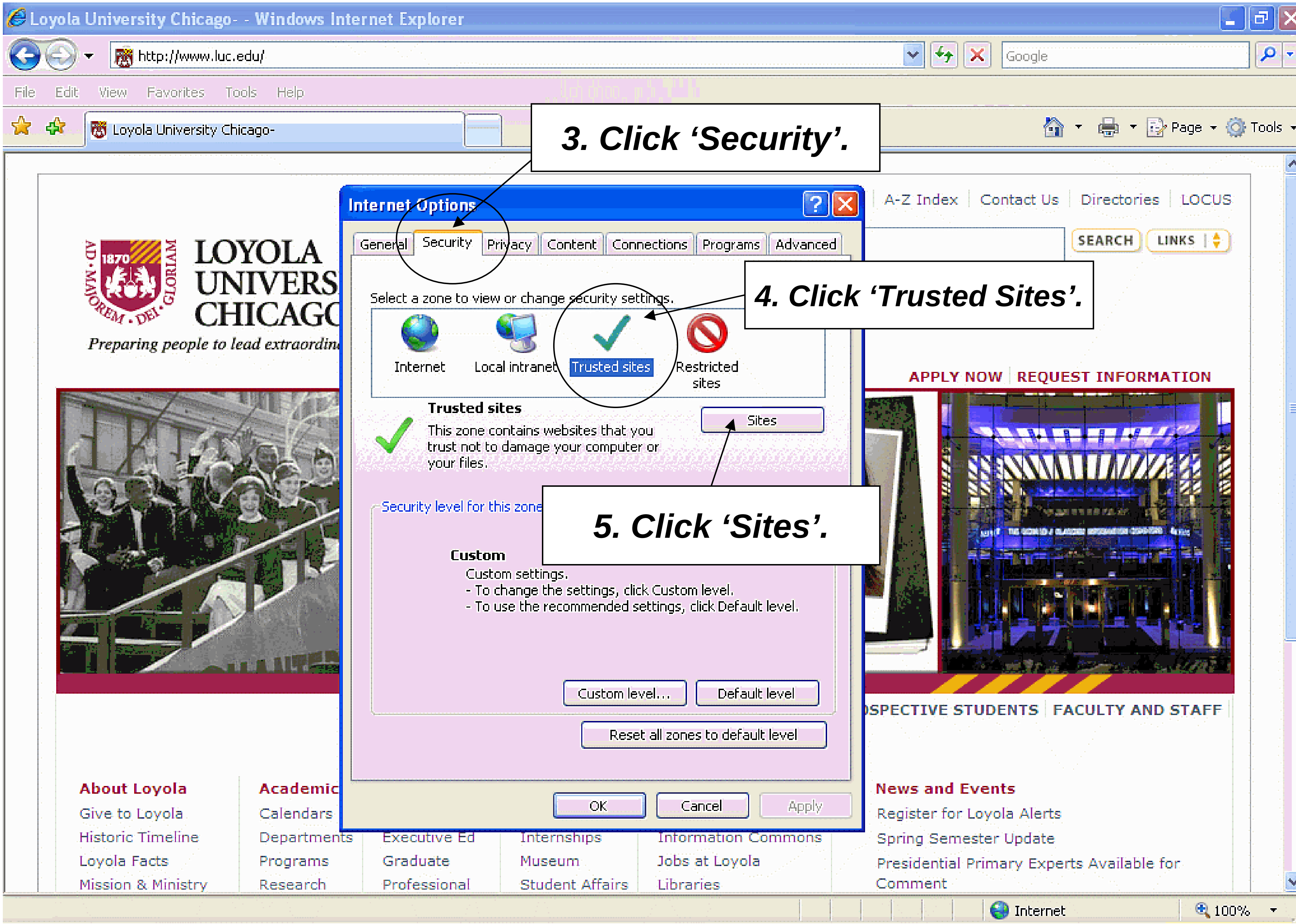
1 - Key information about WebFOCUS:

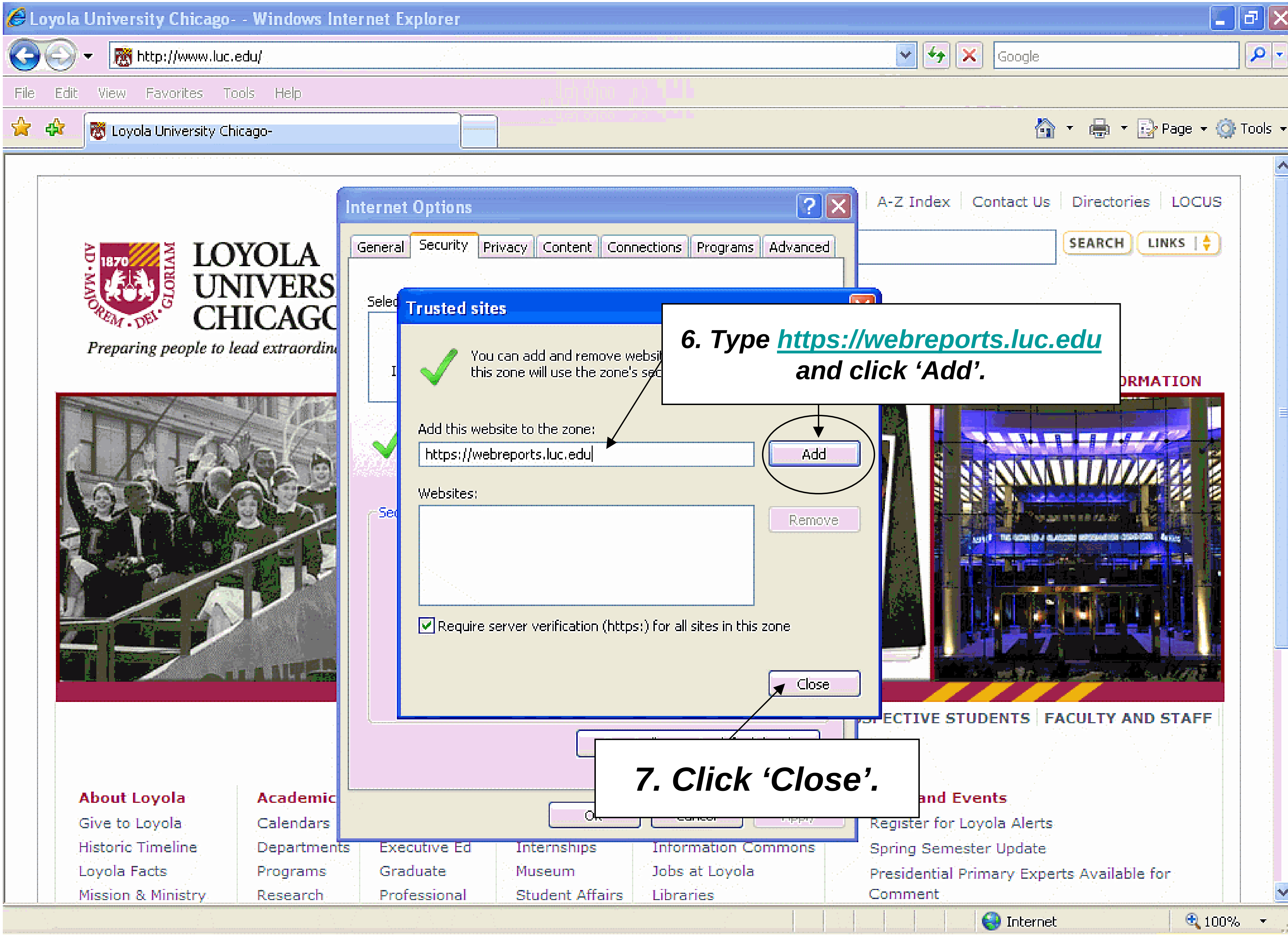
- WebFOCUS is a data extract tool for LU administrators to extract information from Lawson.
- Reports are parameter driven and data may be saved in Excel or PDF format.
- ***Please note: The data contained in WebFOCUS is from the previous day.***
- WebFOCUS can be used with both Microsoft Internet Explorer or Mozilla Firefox.
- **The data extracted from WebFOCUS is for *internal* use only.**

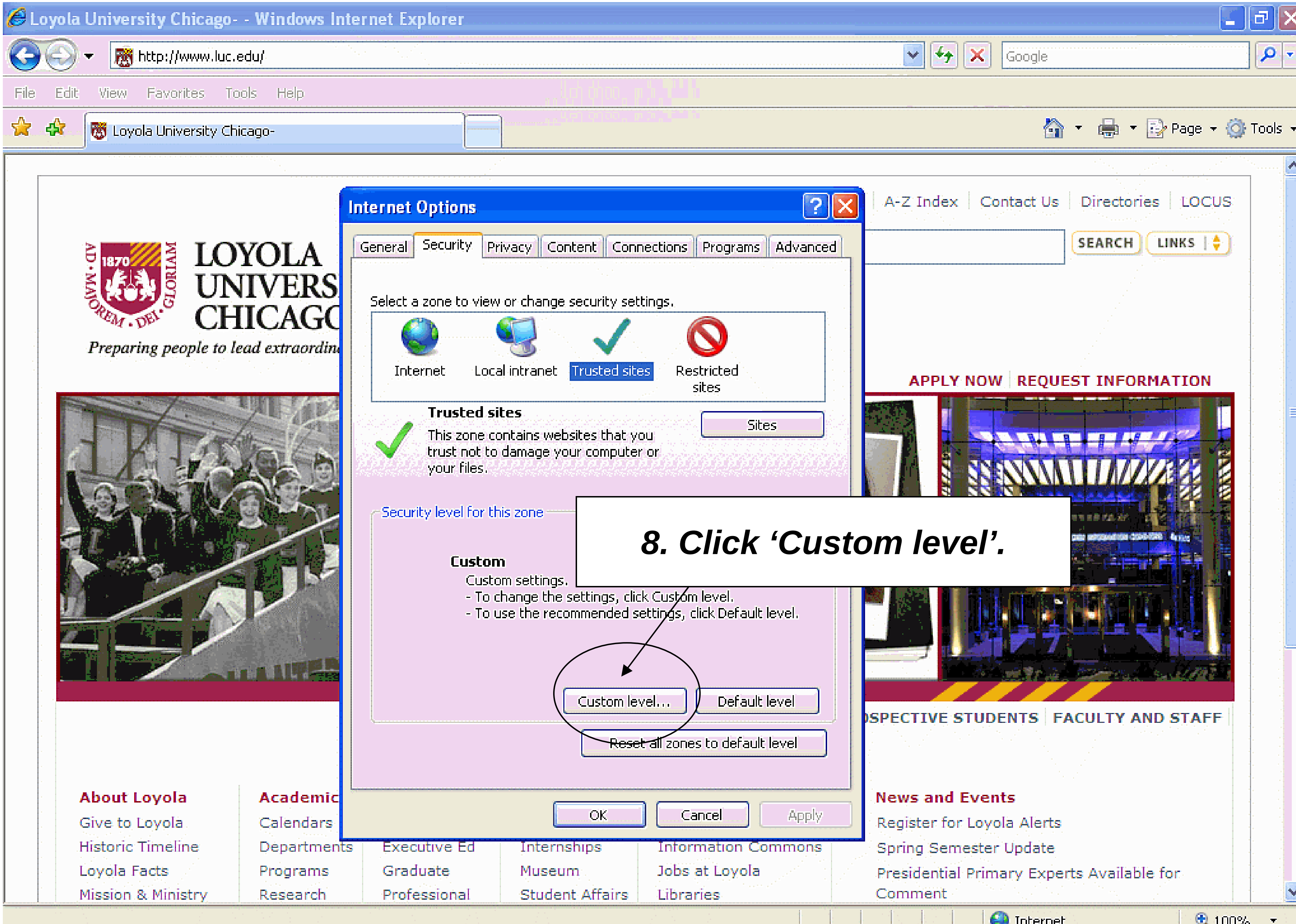
2 - Internet Explorer Security Settings

Depending on your computer's internet security settings, WebFOCUS report downloads may be blocked by your computer. To ensure reports open properly, follow these steps to adjust your internet security settings:



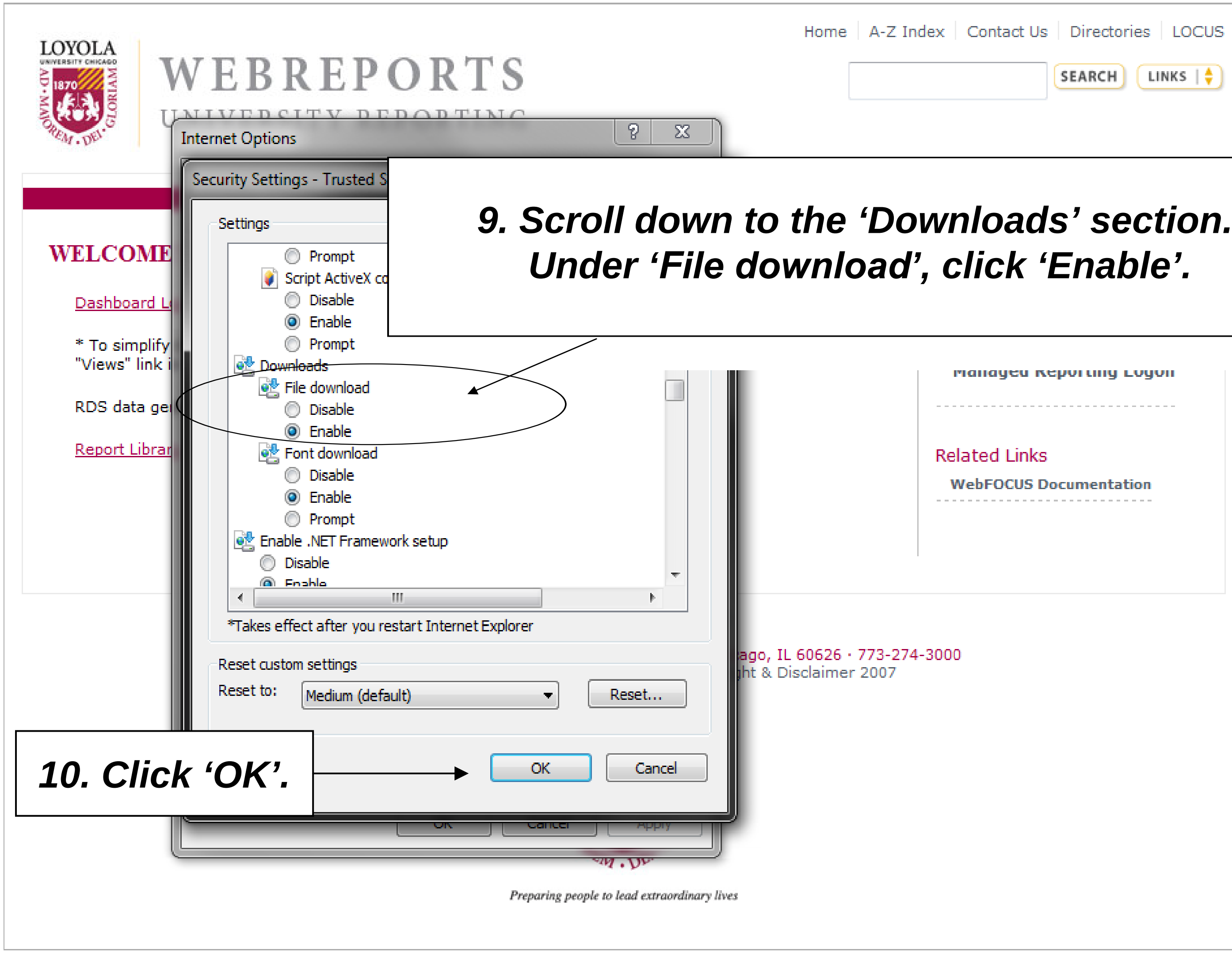

3. Click 'Security'.
4. Click 'Trusted Sites'.
5. Click 'Sites'.
Loyola University Chicago- - Windows Internet Explorer
http://www.luc.edu/
File Edit View Favorites Tools Help
Loyola University Chicago-
Page Tools
Internet Options
General Security Privacy Content Connections Programs Advanced
Select a zone to view or change security settings.
Internet
Local intranet
Trusted sites
Restricted sites
Trusted sites
This zone contains websites that you trust not to damage your computer or your files.
Sites
Security level for this zone
Custom
Custom settings.
- To change the settings, click Custom level.
- To use the recommended settings, click Default level.
Custom level...
Default level
Reset all zones to default level
OK
Cancel
Apply
A-Z Index Contact Us Directories LOCUS
SEARCH LINKS
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Preparing people to lead extraordin
APPLY NOW REQUEST INFORMATION
SPECTIVE STUDENTS FACULTY AND STAFF
About Loyola
Give to Loyola
Historic Timeline
Loyola Facts
Mission & Ministry
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Professional
Internships
Museum
Student Affairs
Information Commons
Jobs at Loyola
Libraries
News and Events
Register for Loyola Alerts
Spring Semester Update
Presidential Primary Experts Available for Comment
Internet
100%


Loyola University Chicago- - Windows Internet Explorer
http://www.luc.edu/
File Edit View Favorites Tools Help
Loyola University Chicago-
Internet Options
General Security Privacy Content Connections Programs Advanced
Trusted sites
You can add and remove websi
this zone will use the zone's sec
Add this website to the zone:
https://webreports.luc.edu
Add
Websites:
Remove
Require server verification (https:) for all sites in this zone
Close
6. Type https://webreports.luc.edu and click 'Add'.
7. Click 'Close'.
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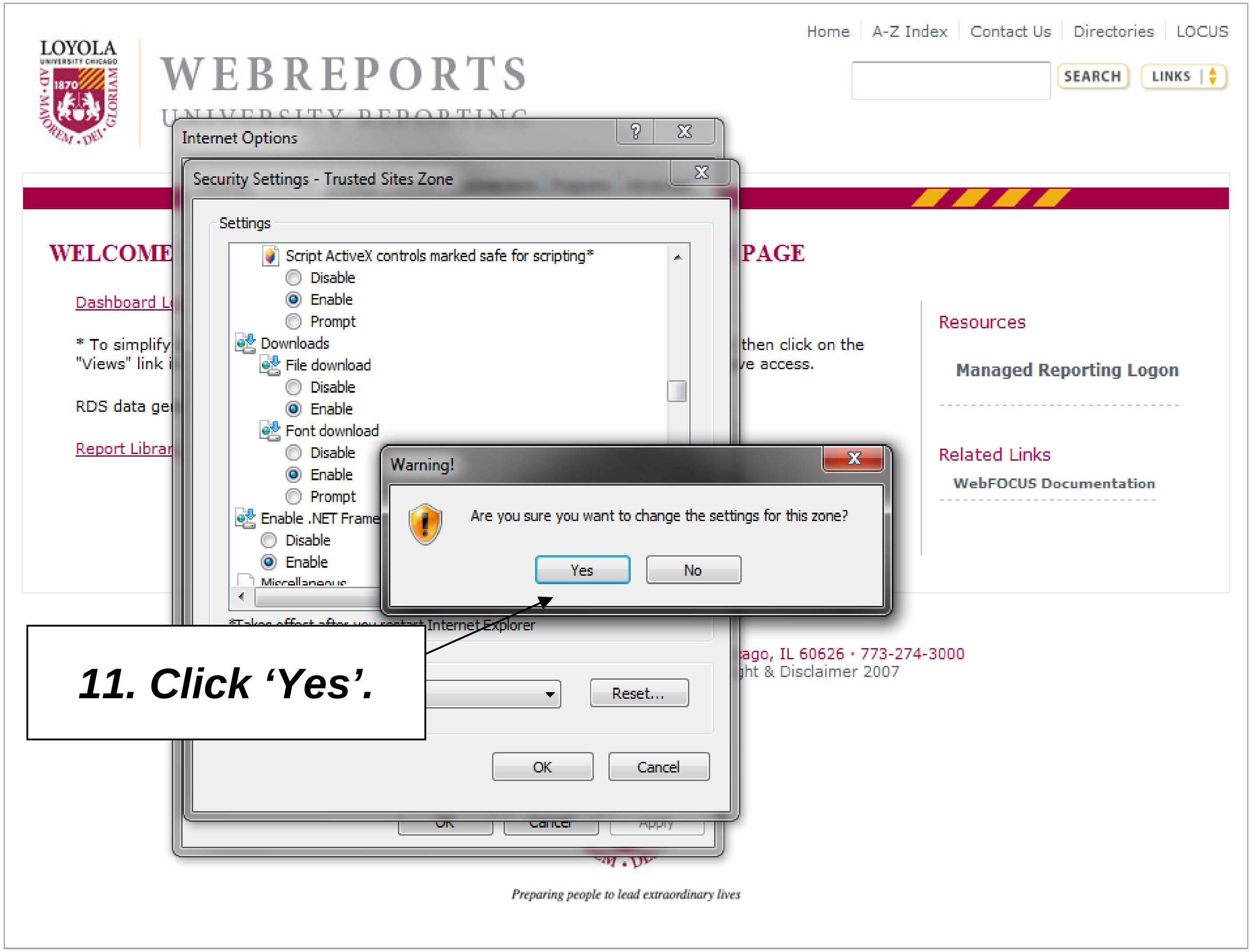


8. Click ‘Custom level’.
Loyola University Chicago- - Windows Internet Explorer
http://www.luc.edu/
File Edit View Favorites Tools Help
Loyola University Chicago-
Internet Options
General Security Privacy Content Connections Programs Advanced
Select a zone to view or change security settings.
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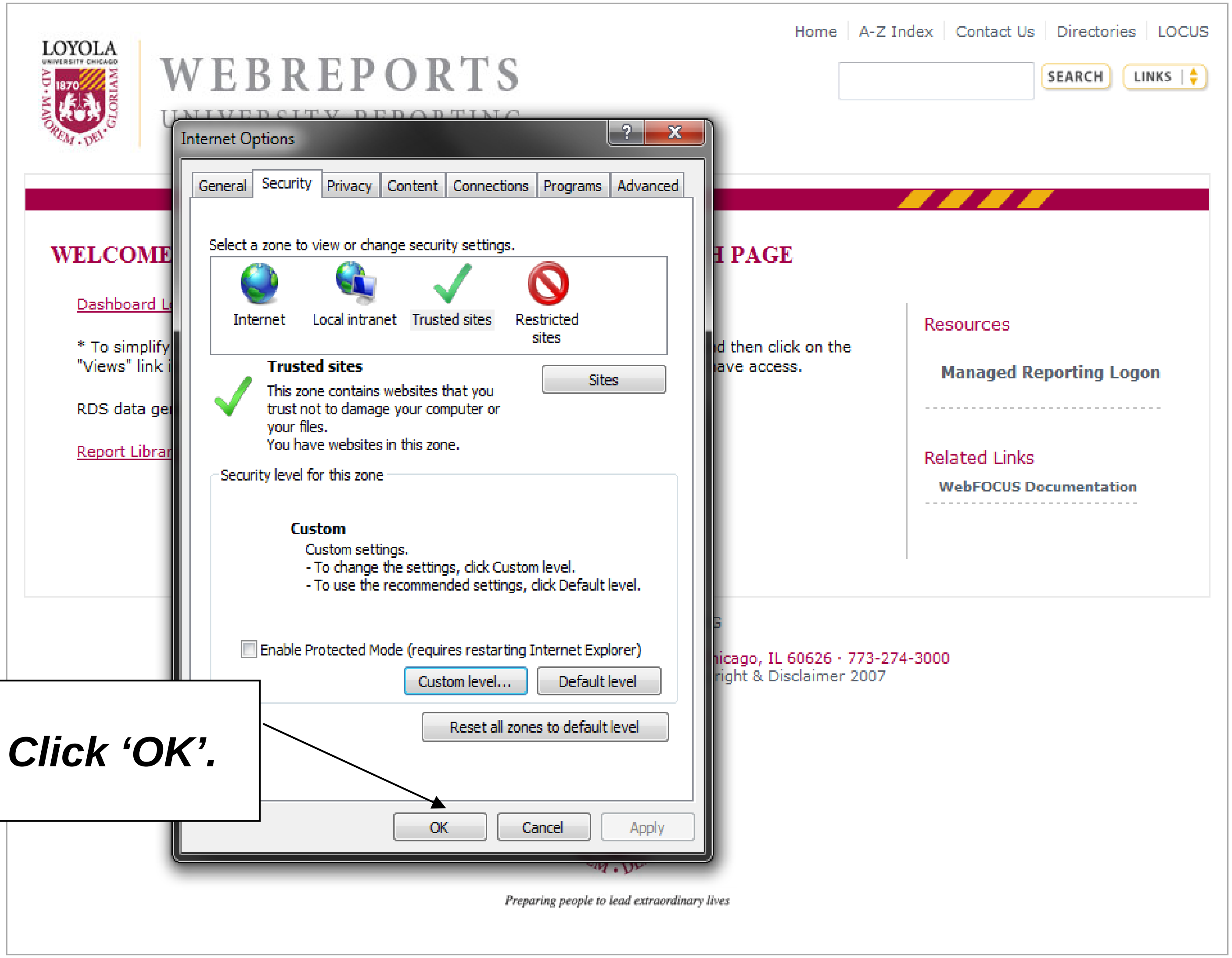
9. Scroll down to the ‘Downloads’ section. Under ‘File download’, click ‘Enable’.



10. Click ‘OK’.


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WEBREPORTS
Internet Options
Security Settings - Trusted Sites Zone
Settings
Script ActiveX controls marked safe for scripting*
Disable
Enable
Prompt
Downloads
File download
Disable
Enable
Font download
Disable
Enable
Prompt
Warning!
Are you sure you want to change the settings for this zone?
Yes
No
Reset...
OK
Cancel
Resources
Managed Reporting Logon
Related Links
WebFOCUS Documentation
Preparing people to lead extraordinary lives

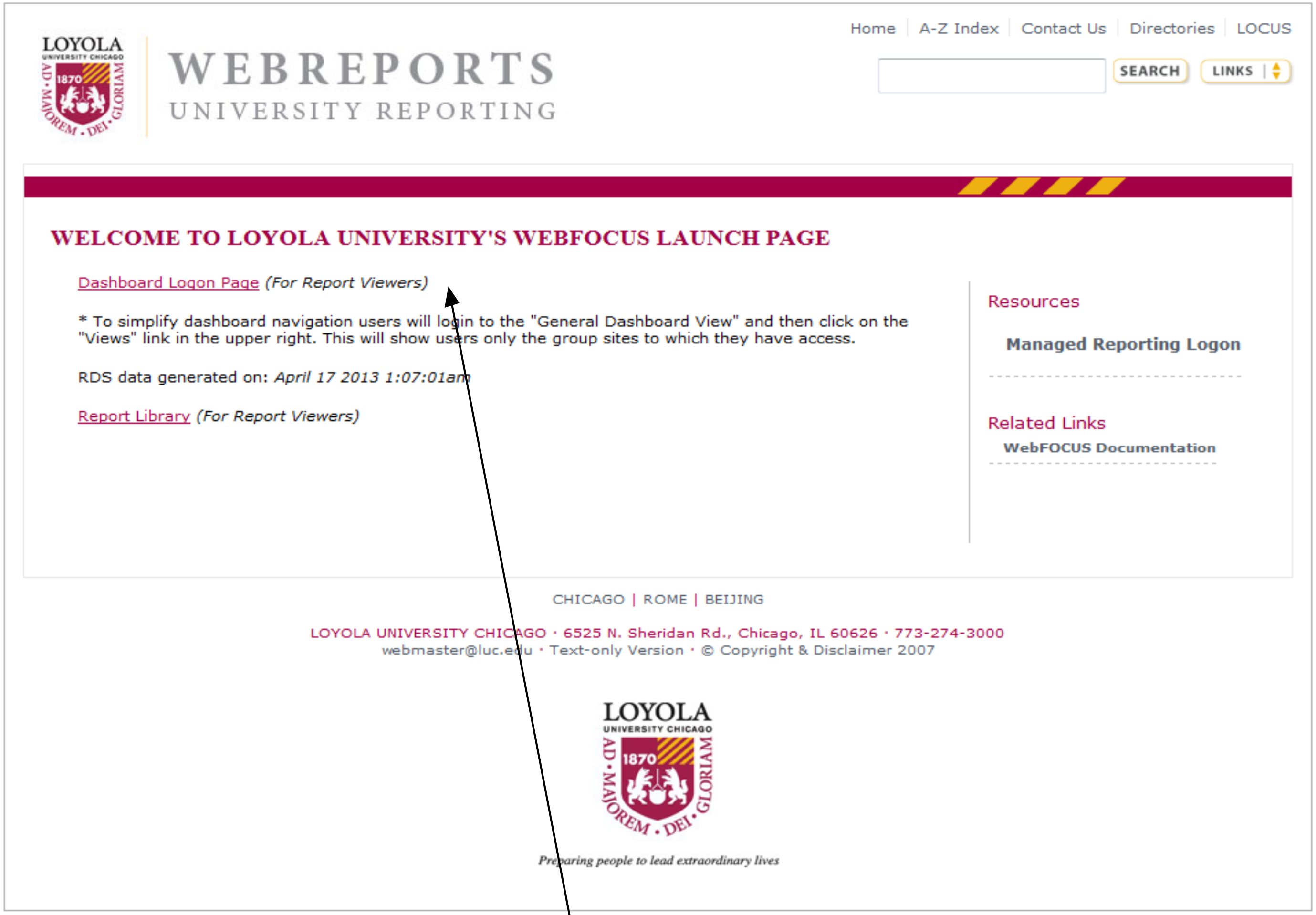
11. Click 'Yes'.


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WEBREPORTS
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Resources
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Related Links
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Internet
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Trusted sites
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Trusted sites
This zone contains websites that you trust not to damage your computer or your files.
You have websites in this zone.
Sites
Security level for this zone
Custom
Custom settings.
- To change the settings, click Custom level.
- To use the recommended settings, click Default level.
Enable Protected Mode (requires restarting Internet Explorer)
Custom level...
Default level
Reset all zones to default level
OK
Cancel
Apply

12. Click 'OK'.

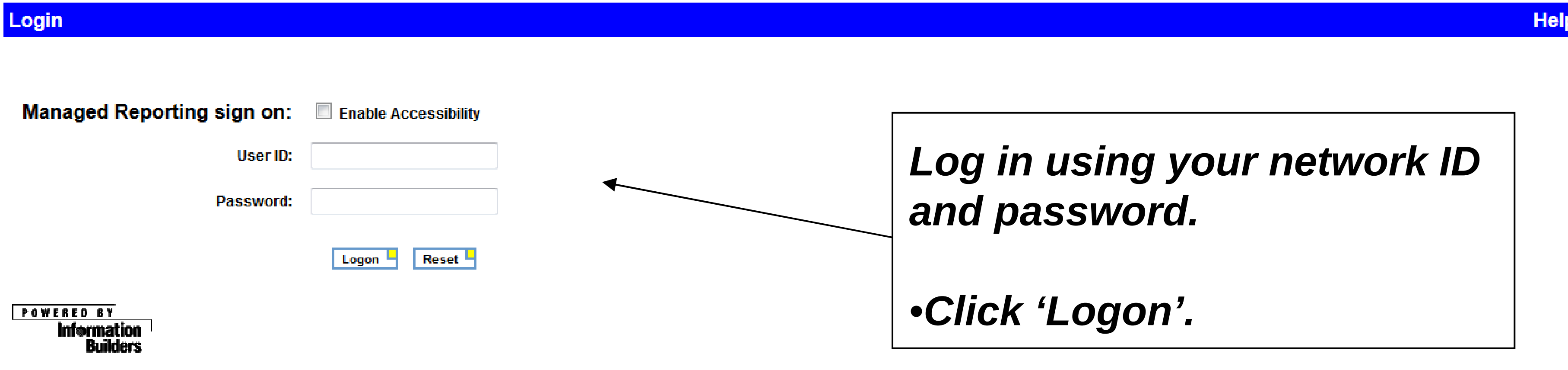
3 - Accessing the WebFOCUS Web Page

To access the WebFOCUS launch page, go to the following URL: ***https://webreports.luc.edu***



Click on 'Dashboard Logon Page'.

4 - Login Screen

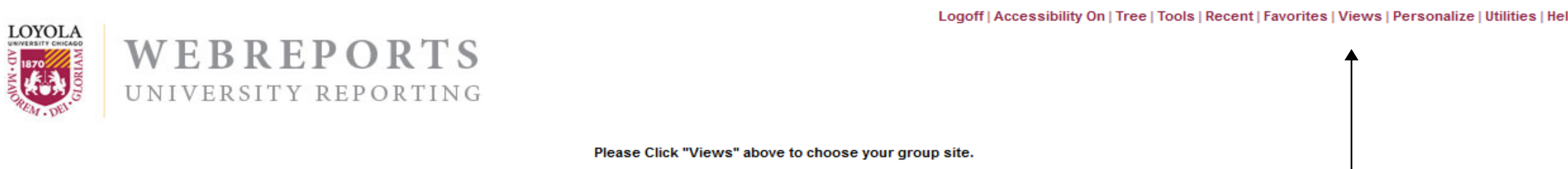


Log in using your network ID and password.

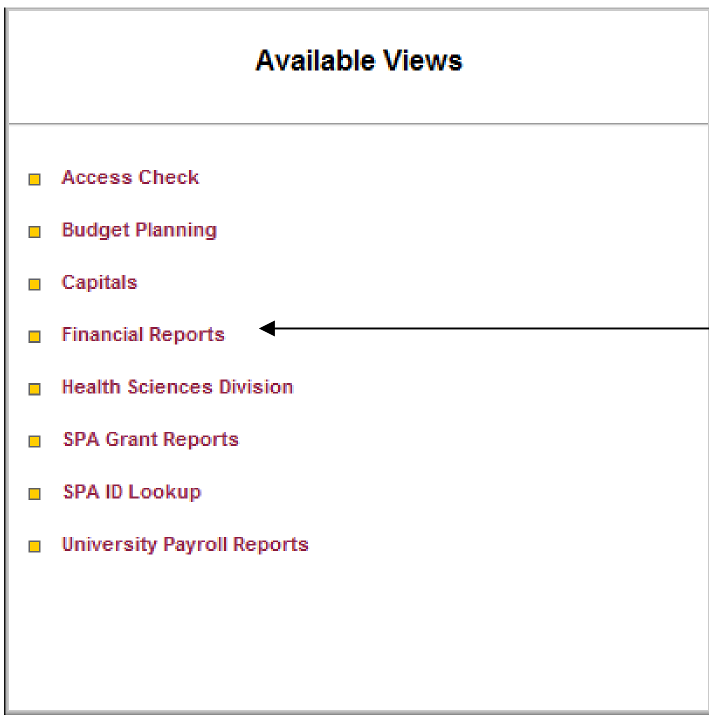
•Click ‘Logon’.

5 - ‘Views’

The ‘views’ page is a listing of the domains (report groups) you have access to view.



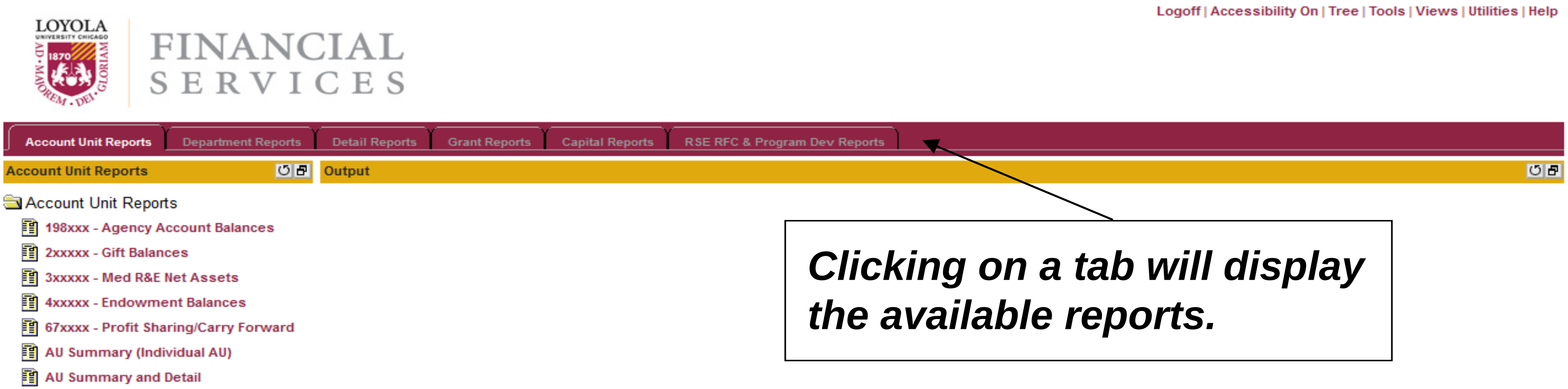
1. Click ‘Views’. A new browser window / tab will open.



2. Click ‘Financial Reports’ to view all available reports.

6 - Report Folders

Report Folders are displayed as tabs, and are a grouping of related reports.

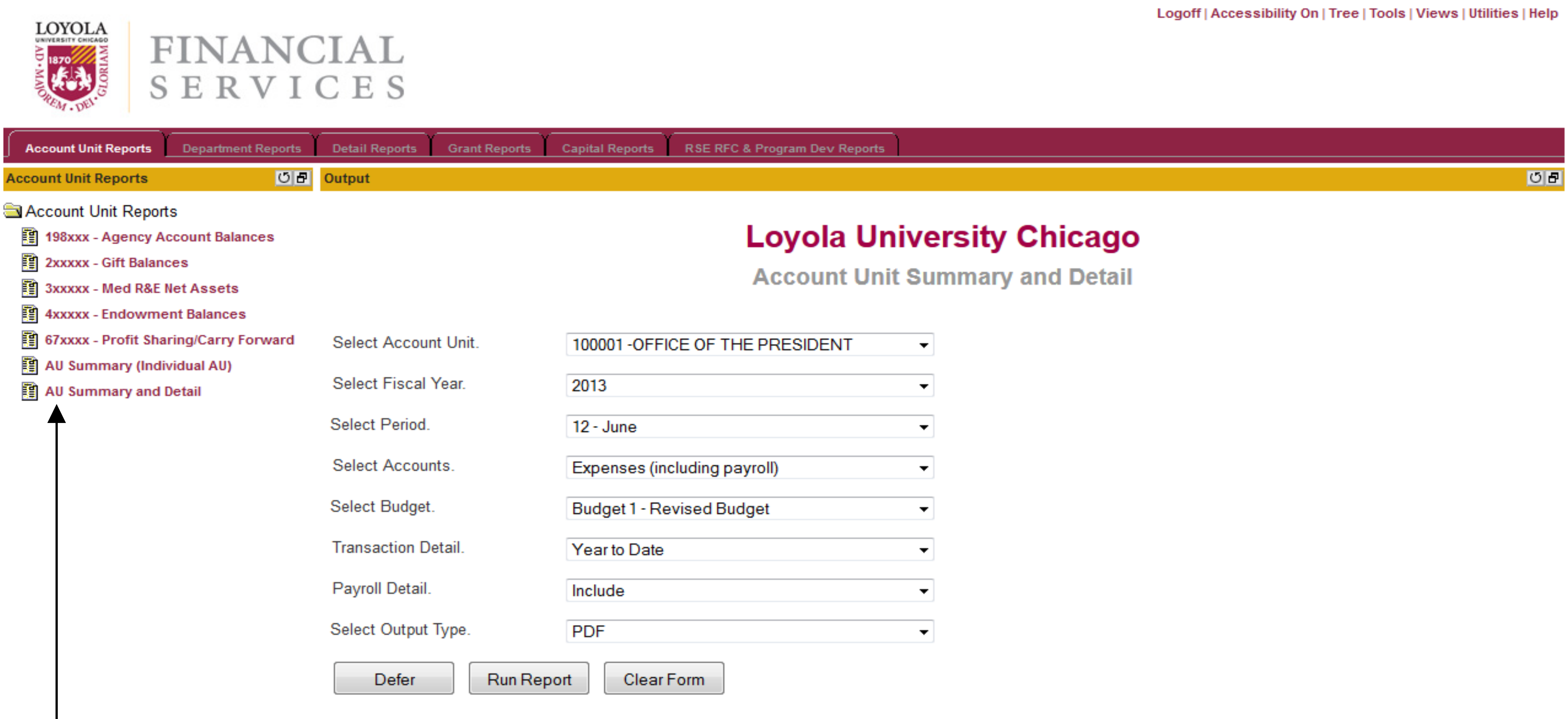


Clicking on a tab will display the available reports.

A list of available reports for the selected report folder.

7 – How to Run a Report

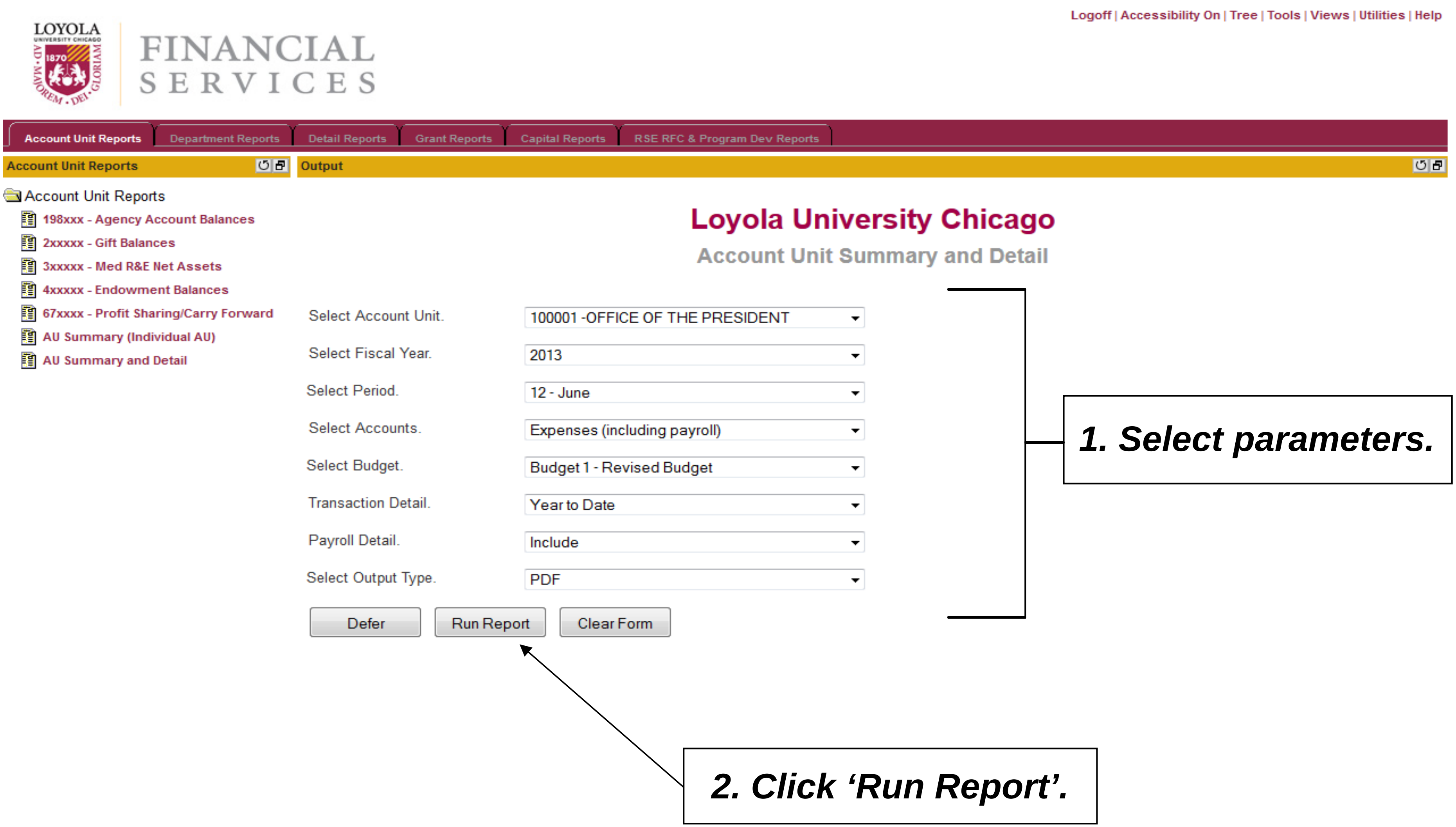
Reports can be run (**a**) immediately, or in a (**b**) deferred status.



To run a report, left-mouse click on the report name. You will be prompted to enter desired parameters.

7a – 'How to Run a Report Immediately'

Selecting 'Run Report' will run the report immediately. ***Only 1 report can be run at a time.***



Output Type 'PDF'

LOYOLA UNIVERSITY CHICAGO
FINANCIAL SERVICES

Click to maximize report in a new window.

Logoff | Accessibility On | Tree | Tools | Views | Utilities | Help

Account Unit Reports | Department Reports | Detail Reports | Grant Reports | Capital Reports | RSE RFC & Program Dev Reports

Account Unit Reports

- Account Unit Reports
  - 198xxx - Agency Account Balances
  - 2xxxxx - Gift Balances
  - 3xxxxx - Med R&E Net Assets
  - 4xxxxx - Endowment Balances
  - 67xxxx - Profit Sharing/Carry Forward
  - AU Summary (Individual AU)
  - AU Summary and Detail

Output

Page: 1 of 2   91%

Click to save report to your PC.

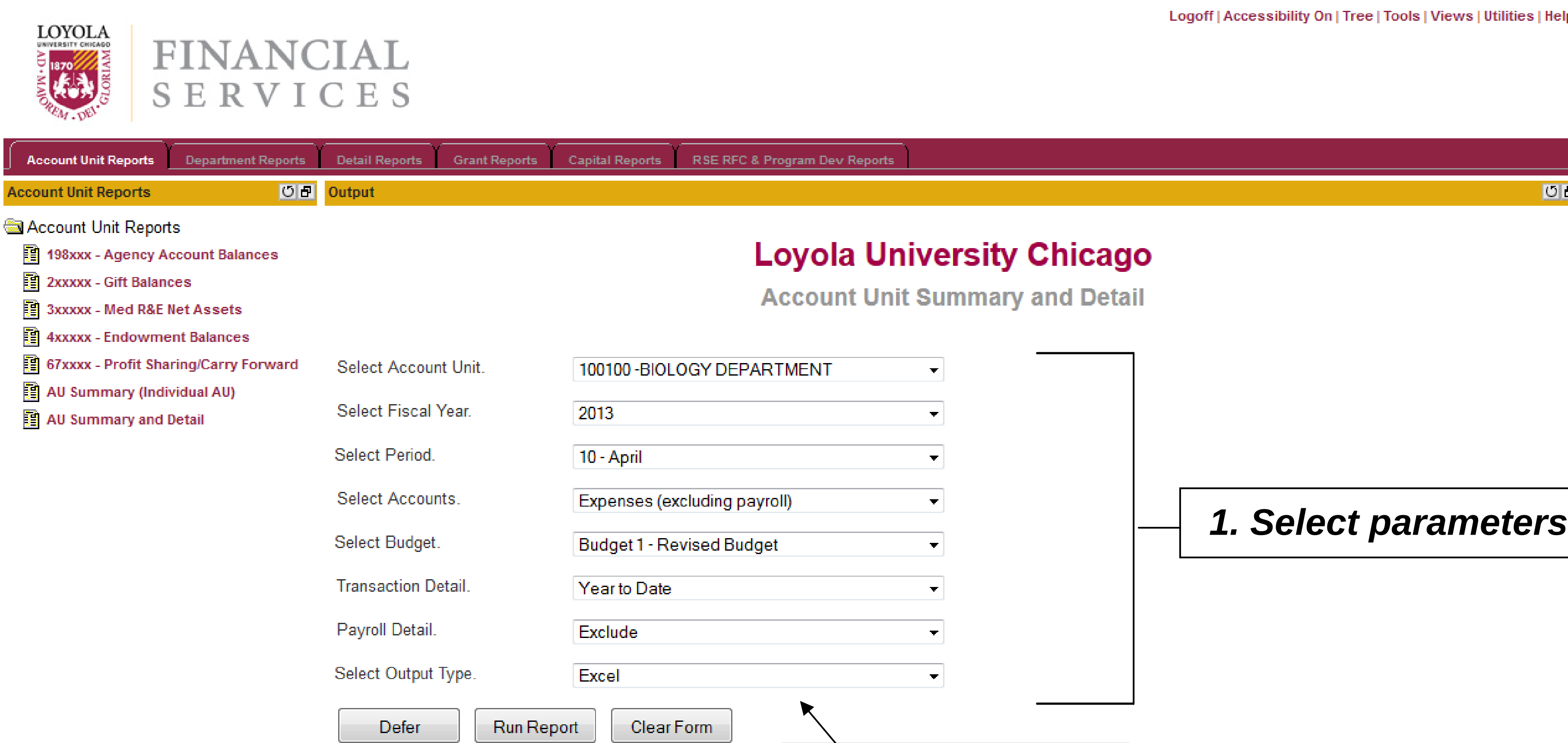
LOYOLA UNIVERSITY CHICAGO

Preparing people to lead extraordinary lives

Loyola University Chicago
Accounting Unit Summary
Revenue & Expenses
AU 100499 - LOYOLA MAGAZINE
As of 04/30/2013

	Revised Budget	Actual Month	Actual YTD	Commitments	Available	% Used
ACCOUNT SUMMARY						
100499 - LOYOLA MAGAZINE						
Expenses						
Direct Non-Salary Expense						
6200 PRINTING - INTERNAL	210,975.00	.00	114,241.97	0.00	96,733.03	54.15%
6202 PHOTOGRAPHY	16,000.00	.00	.00	0.00	16,000.00	.00%
6220 POSTAGE, SHIPPING, HANDLI	94,617.00	18,000.00	89,034.68	0.00	5,582.32	94.10%
6253 CONTRACTED OUTSOURCED SER	19,440.00	.00	3,776.42	0.00	15,663.58	19.43%
Total Direct Non-Salary Expense	**341,032.00**	**18,000.00**	**207,053.07**	**.00**	**133,978.93**	**60.71%**
Total Expenses	**341,032.00**	**18,000.00**	**207,053.07**	**.00**	**133,978.93**	**60.71%**
TOTAL 100499	**341,032.00**	**18,000.00**	**207,053.07**	**.00**	**133,978.93**	**60.71%**

Output Type 'Excel'

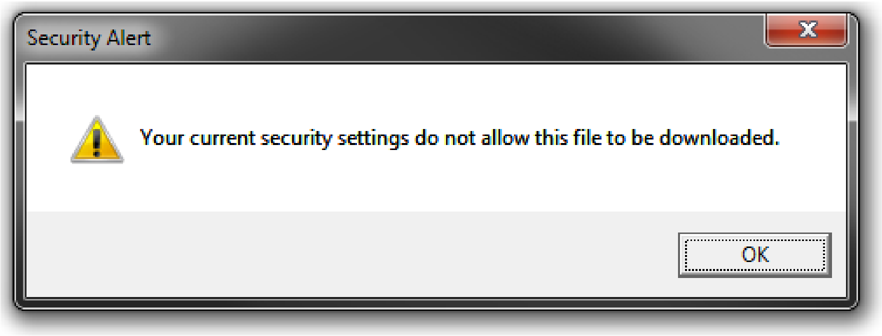


1. Select parameters.

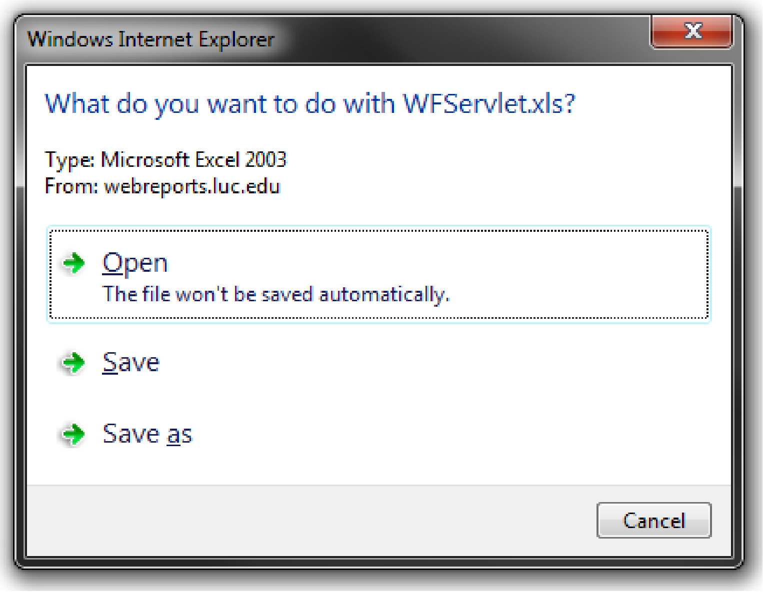
2. Select Output Type 'Excel'.

3. Click 'Run Report'.

If you encounter this error message, or a similar error, after running a report with an Output Type as 'Excel', please refer to Internet Explorer Security Settings on page 2 .



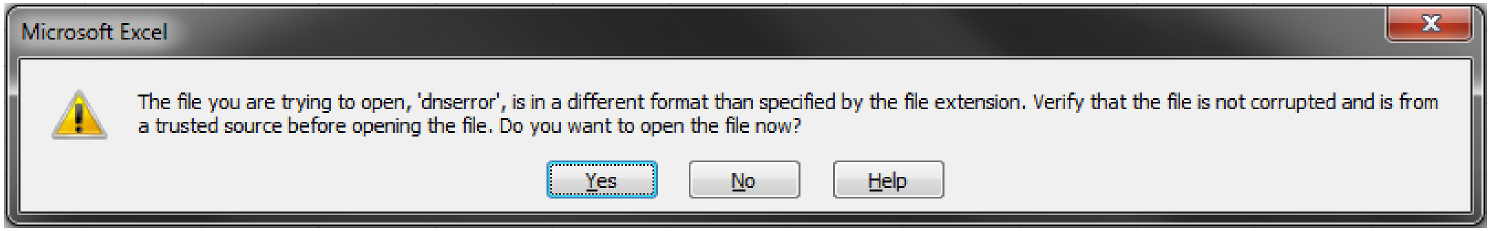
You will be prompted to Open, Save, or Save as.

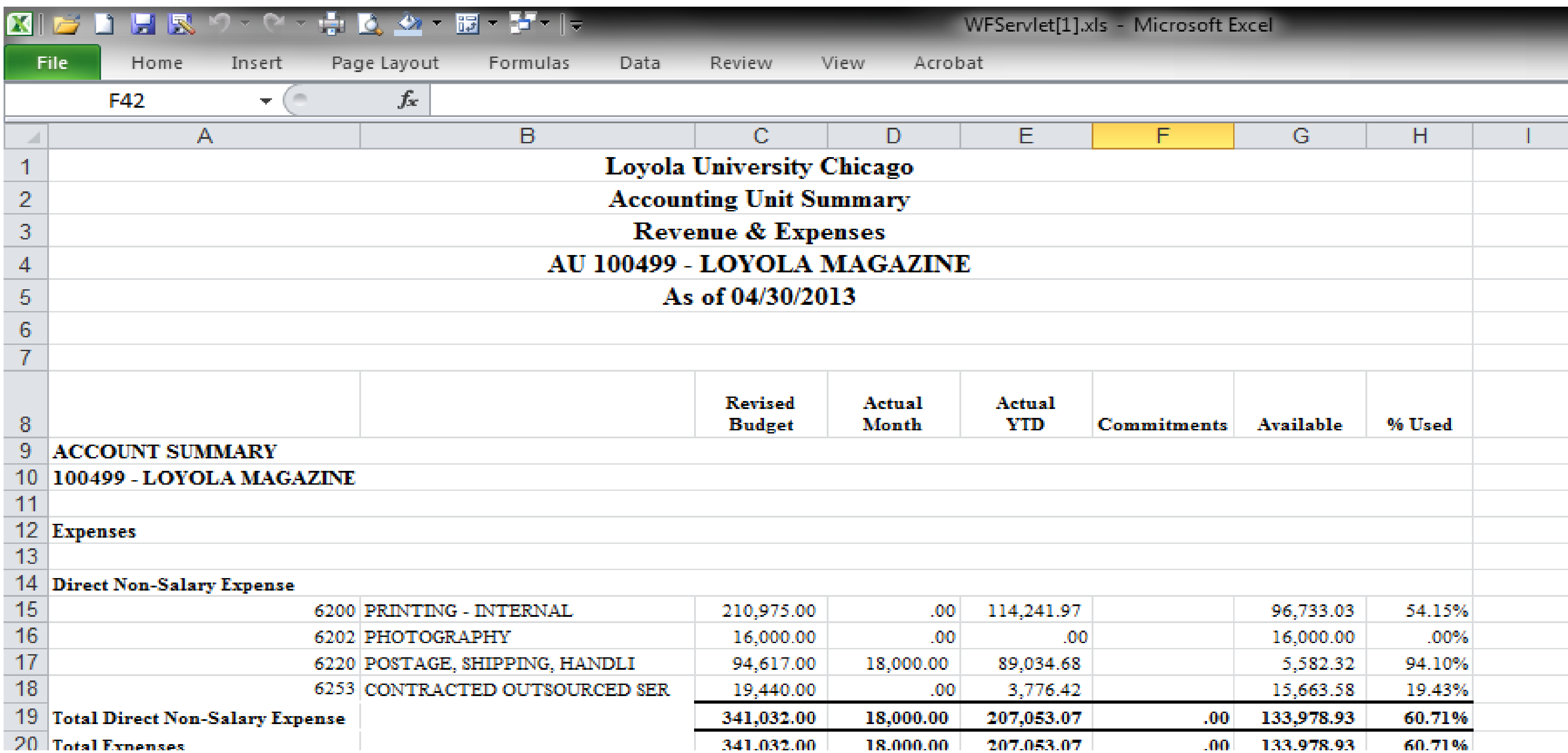


Click 'Open' to open the file in Excel or 'Save'/'Save as' to save the file to your PC.

If you clicked 'Open', the file will open directly in Excel.

Click 'Yes' at the prompt.



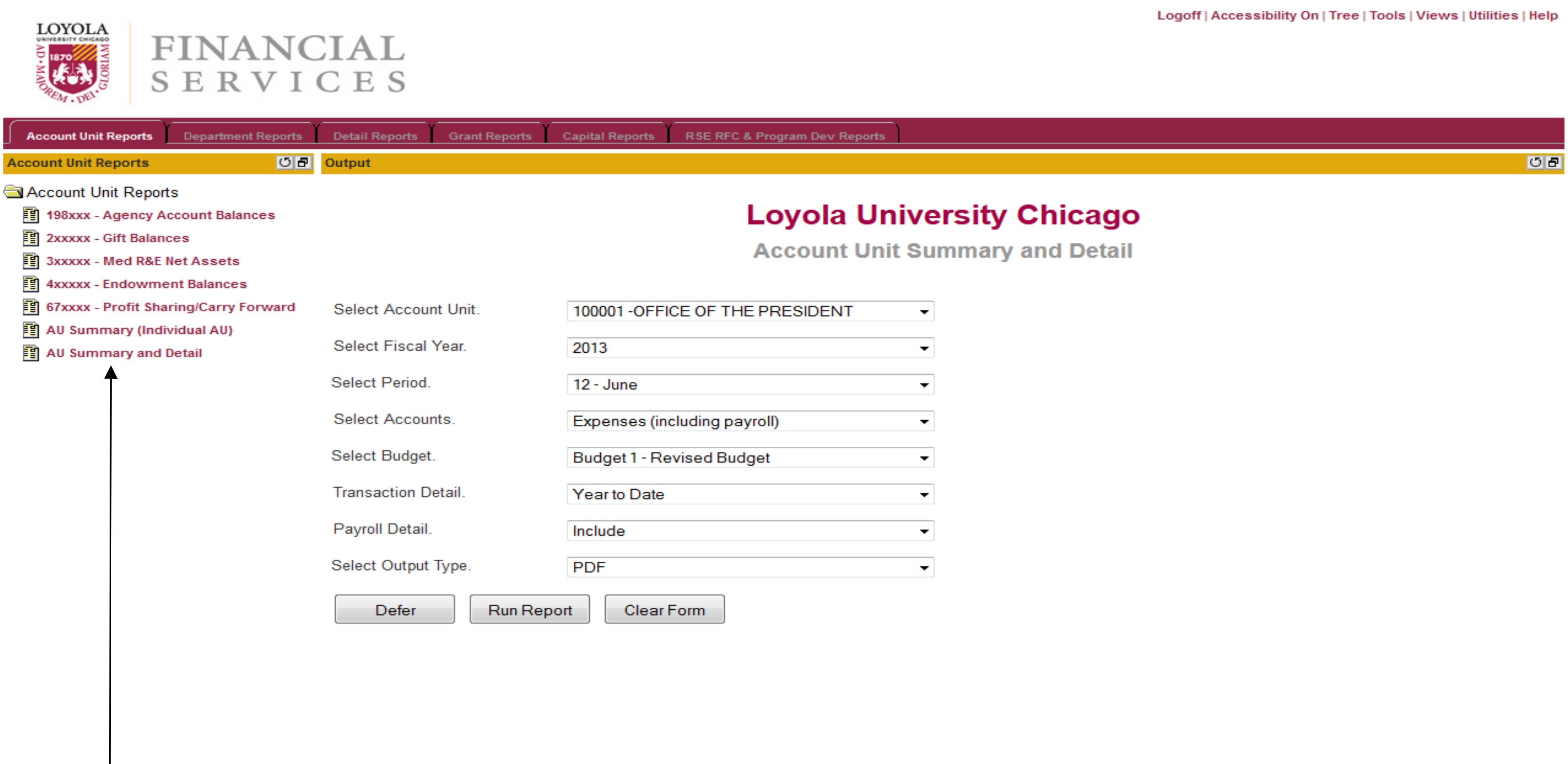


Loyola University Chicago
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Total Expenses		341,032.00	18,000.00	207,053.07	.00	133,978.93	60.71%

7b – Running a report in Deferred Status

Deferred reports run in the background. This allows you to submit multiple reports without having to wait for each report to finish before submitting another. ***Reports run in a deferred status will be saved for 29 days***.



Left-mouse click report name.

Logoff | Accessibility On | Tree | Tools | Views | Utilities | Help

LOYOLA UNIVERSITY CHICAGO

FINANCIAL SERVICES

Account Unit Reports | Department Reports | Detail Reports | Grant Reports | Capital Reports | RSE RFC & Program Dev Reports

Account Unit Reports

- Account Unit Reports
  - 198xxx - Agency Account Balances
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  - 67xxxx - Profit Sharing/Carry Forward
  - AU Summary (Individual AU)
  - AU Summary and Detail

Output

Loyola University Chicago

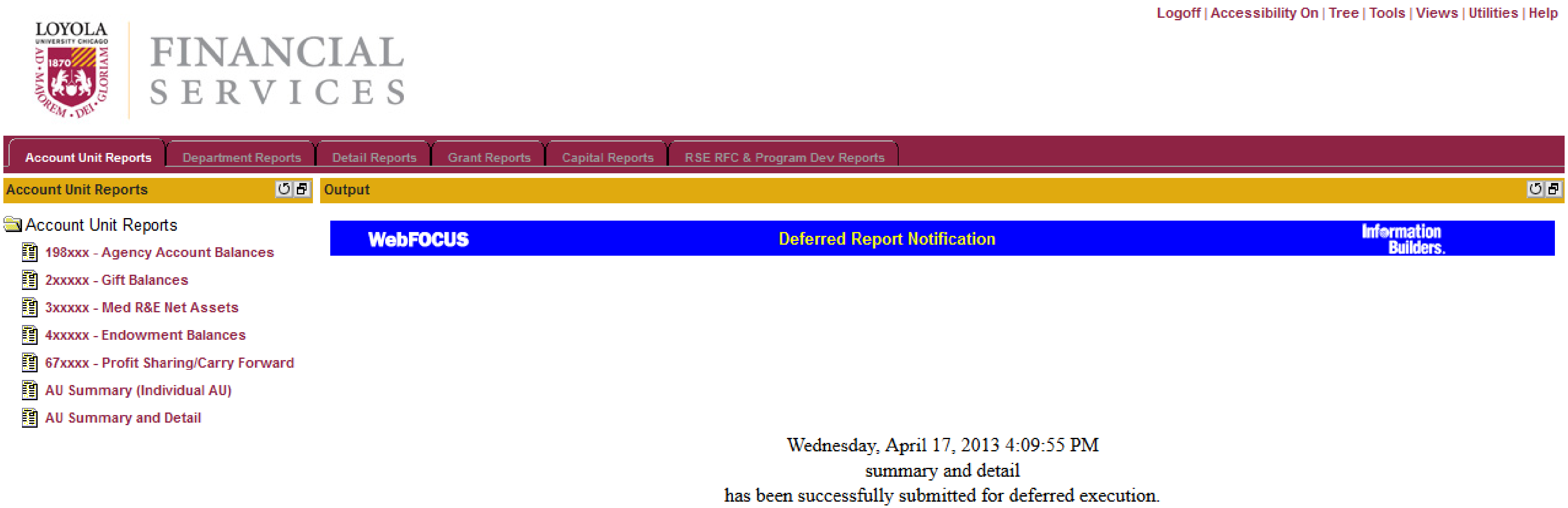
Account Unit Summary and Detail

Select Account Unit.	100001 -OFFICE OF THE PRESIDENT
Select Fiscal Year.	2013
Select Period.	12 - June
Select Accounts.	Expenses (including payroll)
Select Budget.	Budget 1 - Revised Budget
Transaction Detail.	Year to Date
Payroll Detail.	Include
Select Output Type.	PDF

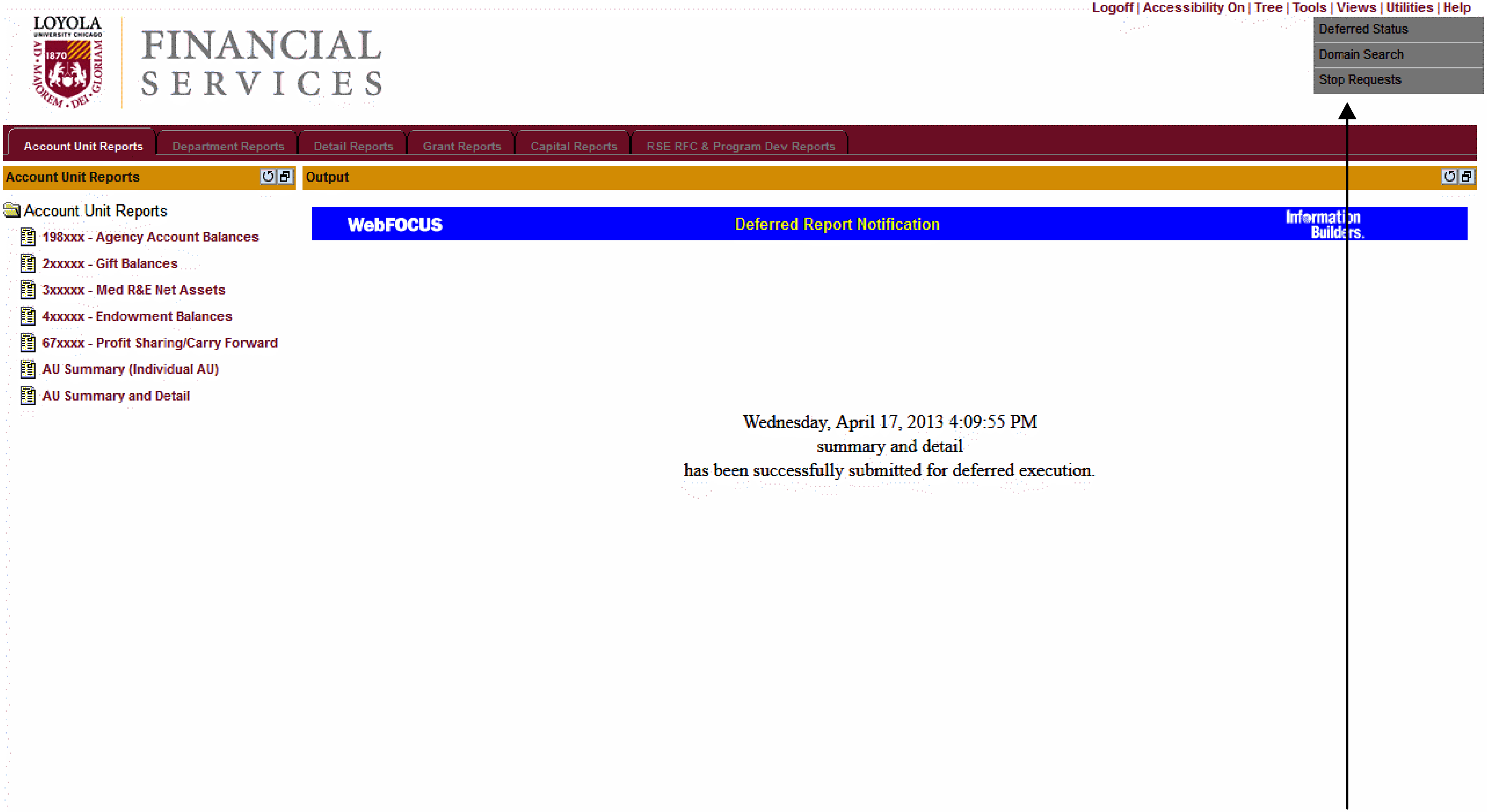
Defer | Run Report | Clear Form

1. Select parameters.

2. Click 'Defer'.

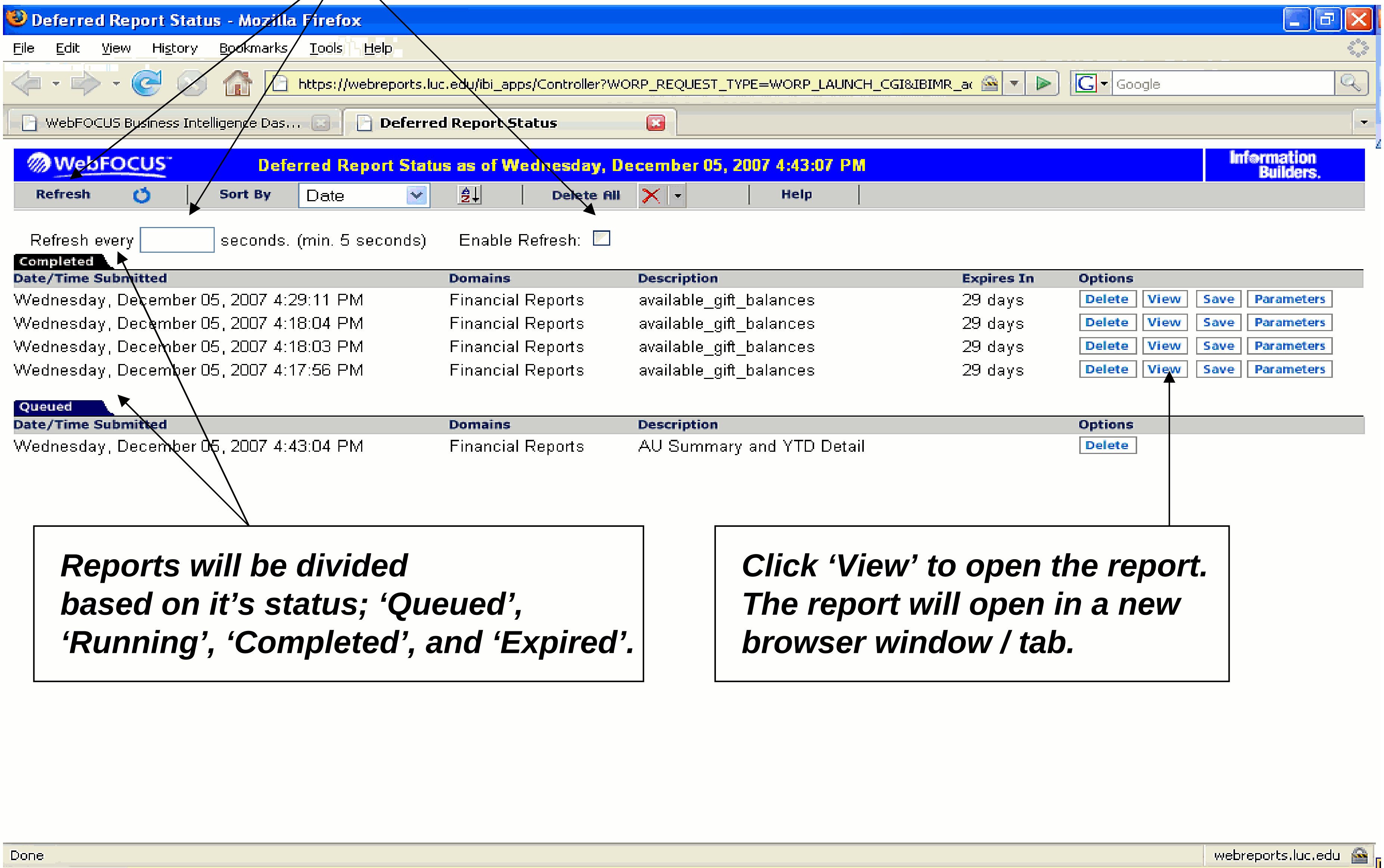


You will receive a confirmation that your report was successfully submitted for deferred status.



To track the status of a deferred report, click 'Utilities' and select 'Deferred Status'. A new browser window / tab will open with this information.

You can refresh the report status manually by clicking 'Refresh',
or automatically, by entering a number of seconds and checking the 'Enable Refresh' box.



Reports will be divided based on it's status; 'Queued', 'Running', 'Completed', and 'Expired'.

Click 'View' to open the report. The report will open in a new browser window / tab.

Contacts

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financialsystems@luc.edu

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x5-8725
rgomez1@luc.edu

Tracy Snowberger – Senior Financial Systems Analyst
x5-8711
tsnowbe@luc.edu

*The WebFocus User Manual can be found here: http://www.luc.edu/finance/fsdoc.shtml